

# OAKS CI

## Capital Improvements (Management System)

SFC-130888 Consultant Process:

- Accepting a Work Assignment
- Creating an Application for Payment
- Uploading to Document Manager

# Task Notification

Ignore X  
Junk Delete  
Delete

Reply Reply All Forward More  
Respond

Meeting  
More

Move to: ?  
Team E-mail  
Reply & Delete

To Manager  
Done  
Create New

Quick Steps

Move  
Move

Rules  
OneNote  
Actions

Assign Policy  
Mark Unread  
Catego

Tags

From: Unifier - Shauna Hooks,soo <unifier@oaksci.training.ohio.gov>  
To: Hooks, Shauna  
Cc:  
Subject: Work Assignments WA-0001 is sent to you for Consultant Acceptance.

This is a system-generated e-mail message. Do not reply to sender.

**Work Assignments WA-0001 is sent to you for Consultant Acceptance.**

From: **Shauna Hooks**  
Sent For: **Consultant Acceptance**  
Task Due Date:

Source Name: **OFCC Specialty Consultant List**  
Record No: **Work Assignments WA-0001**  
Title: **Hawking Consultants WA1**

Additional Information:

[Click here](#) to log into Unifier and take a workflow action.

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For technical assistance contact [support@skire.com](mailto:support@skire.com) or call 1-866-GO SKIRE (467-5473).

You will receive an Email Notification from OAKS CI indicating that you have a pending Work Assignment

# Unifier Login

Open Internet Explorer  
Navigate To

<https://oaksci.ohio.gov>

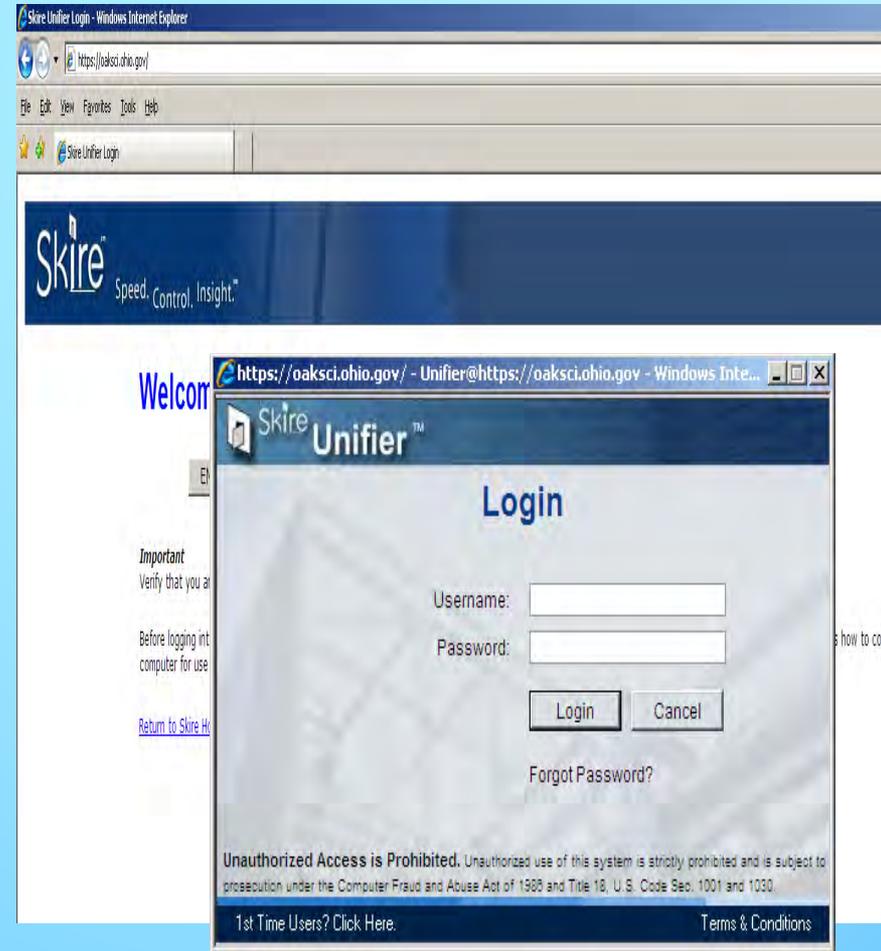
Username:

**your assigned user name**

Password:

**your assigned password**

Click 'Login'



# Cross Project Home Page

The screenshot displays a software interface with a navigation pane on the left and a main content area. The navigation pane includes 'Home', 'Tasks', 'Messages', 'Drafts', and 'uMail'. The main content area features a menu bar (File, Edit, View, Help), a toolbar (New, Open, Find), and several sections: 'Announcements' with two entries, 'Items Requiring Your Attention' with summary statistics, and a 'Tasks or New uMails' table. Red arrows and boxes highlight specific features: 'Cross project tabs' points to the navigation pane, 'Announcements' points to the announcement text, and 'Projects with Active Tasks' points to the table.

**Cross project tabs**

**Announcements**

**Projects with Active Tasks**

Number	Name	Tasks	uMails	Company Name
OCI-100001	SAO Consultant List	249 Total, 242 New, 0 Late	2 New	State of Ohio
OCI-080002	OAKS CI Training 2	10 Total, 5 New, 3 Late	5 New	State of Ohio
OCI-080001	OAKS CI Training 1	26 Total, 16 New, 15 Late	4 New	State of Ohio

# Accepting a Work Assignment

# Acceptance

Unifier@https://ohio-unifier.oracleindustry.com - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/g/nav/index

ORACLE PRIMAVERA UNIFIER Last login: 02/04/2016 01:51 PM

LoCI Sally Post Re... Dist. 11 Headquart... Northcoast Behavio... Pro

Pro Lakeview

sfc-13|0999

Matched Locations

SFC-130999	OFCC Consultant List	
SFC-130888	OFCC Specialty Consultants	/Agency/Ohio Facil ... ruction Commission

Key Locations

527 Items Page 1 of 4

Name	Description	Data Type	Report Type	Owner	Scheduled
72 Hour Notices by Project	(#81C, #317) 72 Ho	72 Hour Notice	Tabular	OHIO Administra	
A/E Contracts		Professional Serv	Tabular	Ned Thiehl	
A/E Short Listed		Professional Serv	Tabular	Ned Thiehl	
ADJ Local Project Information		Shell Information	Tabular	Barbara Taylor	
AE Agreements in the Past 24 Months		Professional Serv	Tabular	Rita Nichols	
AE Fees	Not pulling correct	Professional Serv	Tabular	Ned Thiehl	
AE Fees 24 months		Professional Serv	Tabular	Rita Nichols	
AE Vendors in Building Projects		Project Vendors	Tabular	Barbara Taylor	
AHE Annual Status Report		Project Milestone	Tabular	Ned Thiehl	

- Type the name of the project into the Search bar
- Double Click on the Project

# Work Assignment

- ▶ You are now on your project home page
  - Click Collaboration
  - Click Task's
  - Double click on your pending Work Assignment

The screenshot shows a software interface with a navigation pane on the left and a task list on the right. The navigation pane contains the following items: Projects (Standard), OFCC Specialty Consultants, Summary, Alerts, uMail, Collaboration, Tasks, Messages, Drafts, Information, Data Manager, Document Manager, Logs, and Reports. The 'Collaboration' and 'Tasks' items are highlighted with blue arrows. The task list on the right shows two items:

Type	Number	Title	Record Due	From	Sent for	Task Due	Re
Work Assign	WA-0012	Claims Evaluation		Matthew Weste	Consultant Acce		01.
Work Assign	WA-0004	Claims Evaluation:		Marlaina Hill,sc	Consultant Acce		10.

# Work Assignment

- ▶ Click Accept Task to open record

Work Assignments - Claims Evaluation - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help

Accept Task Decline Task SOV Close Window

### General

Work Assignments

General

Organization:  Record Number: WA-0012

Project Number: SFC-130888 Creator: [Matthew Westerman](#)

Project Name: OFCC Specialty Consultants Creation Date: 01/28/2014 01:07 PM Local (GMT-5)

Title: Claims Evaluation Status: Pending

Requested By: [Matt Westerman](#)

### Task Details

From: [Matthew Westerman](#) Task Due Date:

To: [Shari Aliff](#) Task Status: [Not Started](#) Task Notes (0)

Cc:

Sent For: **Consultant Acceptance**

### Standard

Current View: All Show Currency in: Transaction Currency

2 item(s) Page 1 of 1 Display 100 items per page

No.	WBS Code	Code Name	Short Description	Amount (\$)	District
002	CS-LE-SV	CS Legal SOV Pending	Contract Amount (Not Billable Until A	-50,000.00	Springfield Local SD (Sum
001	CS-LE-AC	CS Claims Analysis	Claim Evaluation	50,000.00	Springfield Local SD (Sum

Grid Find Total Amount: \$ 0.00

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# Work Assignment

- ▶ Click General Tab to open upper form

Work Assignments - Claims Evaluation - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

**General** Work Assignments

Take the workflow action Sign Work Assignment to accept this assignment.

General

Organization: [ ] Record Number: WA-0012

Project Number: SFC-130888 Creator: Matthew Westerman

Project Name: OFCC Specialty Consultants Creation Date: 01/28/2014 01:07 PM Local (GMT-5)

Title: [ ] Status: [ ]

**Action Details**

(Click here to view latest content)

To: [ ]

Cc: [ ]

Send For:

**Standard**

Current View: All Show Currency in: Transaction Currency

2 Item(s) Page 1 of 1 Display 100 items per page

No.	WBS Code	Code Name	Short Description	Amount (\$)	District
002	CS-LE-SV	CS Legal SOV Pending	Contract Amount (Not Billable Until A	-50,000.00	Springfield Local SD (Sum
001	CS-LE-AC	CS Claims Analysis	Claim Evaluation	50,000.00	Springfield Local SD (Sum

Total Amount: \$ 0.00

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

# Work Assignment

- ▶ Review upper form
- ▶ Click Standard tab to review lower form

Work Assignments - Claims Evaluation - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

**General** Work Assignments

Take the workflow action Sign Work Assignment to accept this assignment.

General

Organization:  Record Number:

Project Number:  Creator:

Project Name:  Creation Date:

Title:  Status:

Requested By:

Agreement

Contract Reference:  Request Type:

Vendor Name:  Type of Services:

EDGE Certified Prime?:  Service Category:

Contacts

District:

Building Name(s):

District Location:

District Contact:  District Contact Phone:

OFCC Contact:  OFCC Contact Phone:

CM Contact:  CM Contact Phone:

**Action Details**

**Standard**

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

# Work Assignment

- ▶ Once review is complete
- ▶ Click the arrow down next to Workflow Actions
- ▶ Choose :
  - Sign Work Assignment
  - or
  - Return for Clarification
- ▶ Click Send

Work Assignments - Claims Evaluation - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help

Send Save Spelling.. Add Attachment Discussion SOV Close Window

Workflow Actions -Select-

Sign Work Assignment

Return for Clarification

Take the workflow action Sign Work Assignment to accept this assignment.

General

Organization: Record Number: WA-0012

Project Number: SFC-130888 Creator: Matthew Westerman

Project Name: OFCC Specialty Consultants Creation Date: 01/28/2014 01:07 PM Local (GMT-5)

Title: Claims Evaluation Status: Pending

Requested By: Matt Westerman

Agreement

Contract Reference: - Claims Request Type: Original

Vendor Name: Type of Services: Claims Evaluation

EDGE Certified Prime?: Service Category:

Contacts

District: Springfield Local SD (Summit)

Building Name(s): Springfield High School

District Location: Akron Summit County

District Contact: Chris McCloskey District Contact Phone: 614 227-2300

OFCC Contact: Bill Coursin OFCC Contact Phone: 330 425-2423

CM Contact: Jeff Fullerman Regency CM Contact Phone:

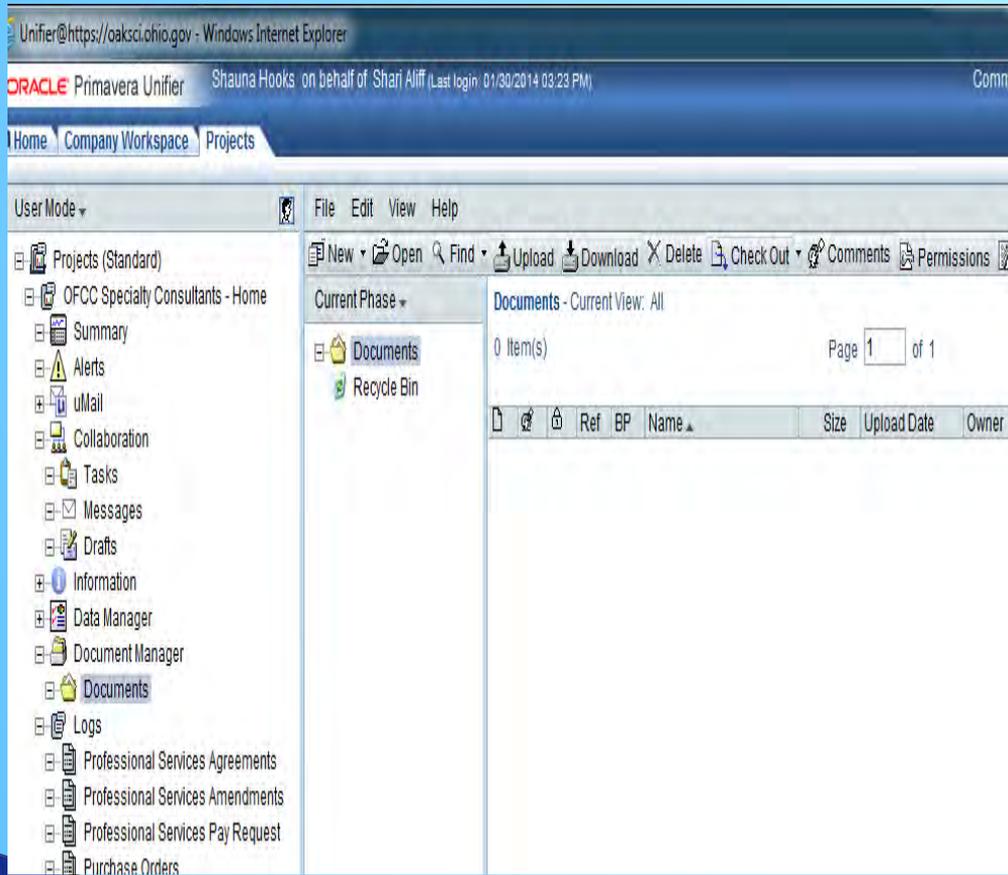
Action Details

Standard

Attachments (0) Linked Records (0) General Comments Linked Mail (0)

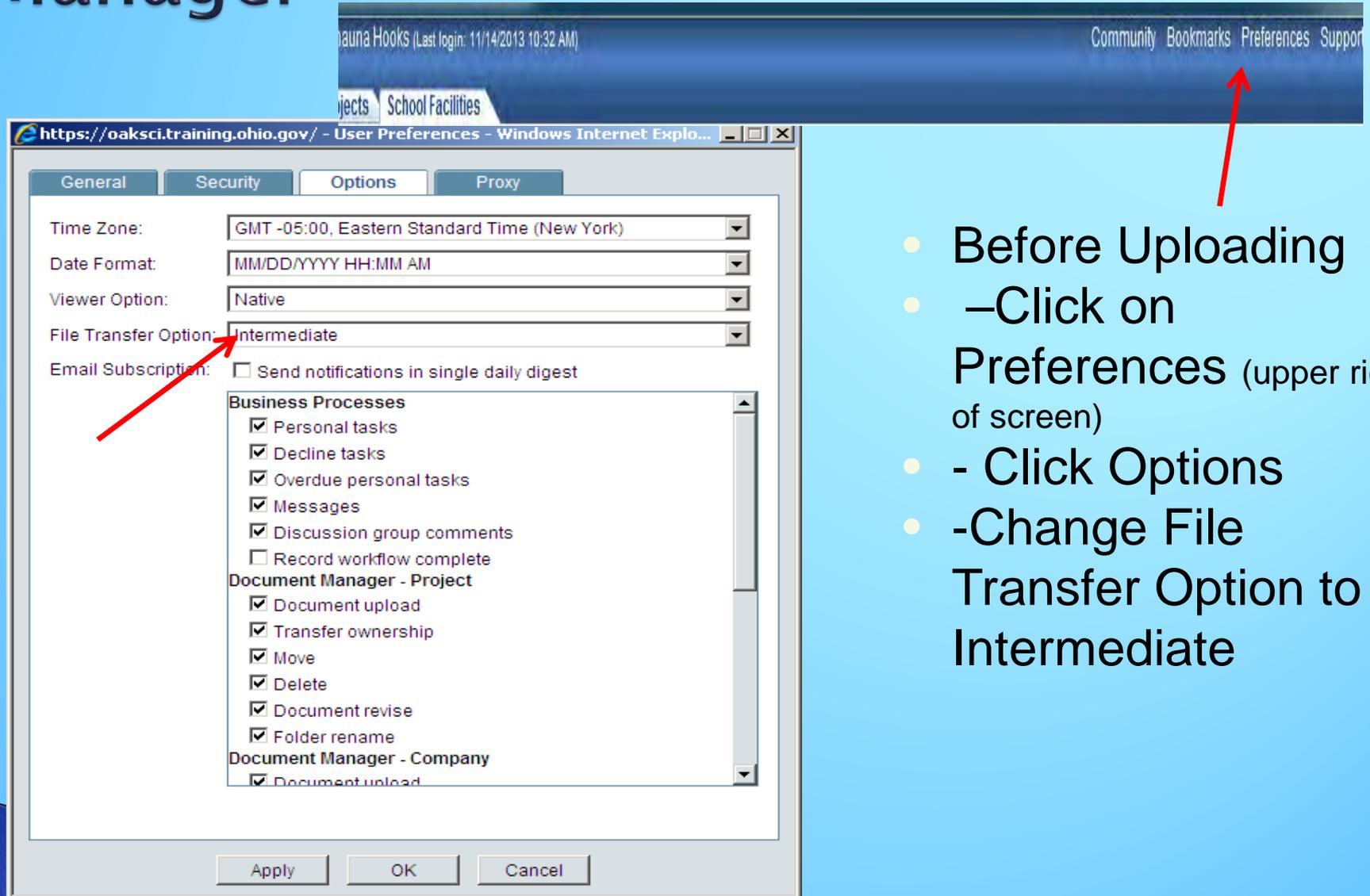
# Request for Payment

# Supporting Documentation



If you have supporting documentation that must be attached to the pay application it must be uploaded into document manager first, please see slides (14-18)

# Before Uploading to Document Manager



The image shows a screenshot of a web application interface and a Windows Internet Explorer dialog box. The web application header includes 'Community Bookmarks Preferences Support' with a red arrow pointing to 'Preferences'. The dialog box is titled 'User Preferences - Windows Internet Explorer' and shows the 'Options' tab. The 'File Transfer Option' is set to 'Intermediate', with a red arrow pointing to it. The dialog box also shows sections for 'Business Processes', 'Document Manager - Project', and 'Document Manager - Company' with various checkboxes.

- Before Uploading
- –Click on Preferences (upper right of screen)
- - Click Options
- -Change File Transfer Option to Intermediate

# Building/Project Home Page

The screenshot shows the Primavera Unifier web interface. The browser title is "Unifier@https://oaksci.training.osfc.ohio.gov - Windows Internet Explorer". The user is "Shauna Hooks" with a last login of "10/08/2013 09:21 AM". The page is titled "Central Elementary - Home" and includes a "View Dashboard" button. The left navigation menu contains the following items: Alerts, uMail, Collaboration, Information, Cost Manager, Data Manager, Document Manager (highlighted with a blue arrow), Logs, and Reports. The main content area is divided into several sections: "Summary" with an "Image" placeholder; "Items Requiring Your Attention" showing 0 new tasks, messages, draft records, and uMails; "Details" with project information (Number: SFC-130322.02, Name: Central Elementary, Description: New Elementary School, Administrator: Steve Mayo, Currency: United States Dollar (USD), Status: Active, Email: 1015-oaksci@socccemsmp.em.ohio.gov); and "Links" with "Ohio Facilities Construction Commission" and "Ohio School Facilities Commission".

-Click Document Manager  
-Documents

# File Upload

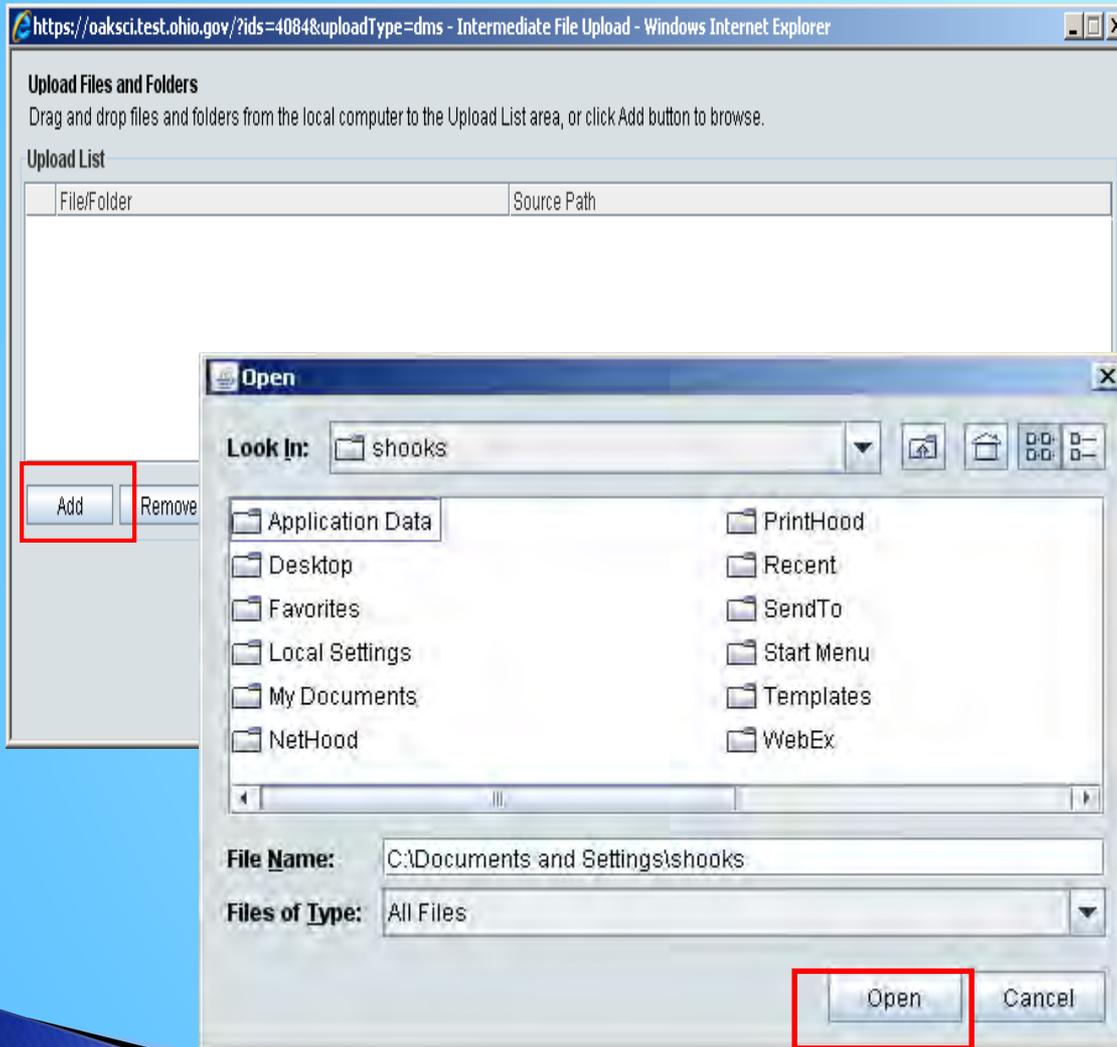
(a) Choose folder

(b) Click Upload

The screenshot shows a web application interface for file management. The browser address bar indicates the URL is <https://oaksci.training.ohio.gov>. The page title is "12/09/2009 - Shauna Hooks". The interface includes a navigation pane on the left with a tree view of folders. The main area displays a list of files in a table format. A red arrow points to the "Documents" folder in the navigation pane, and another red arrow points to the "Upload" button in the top toolbar.

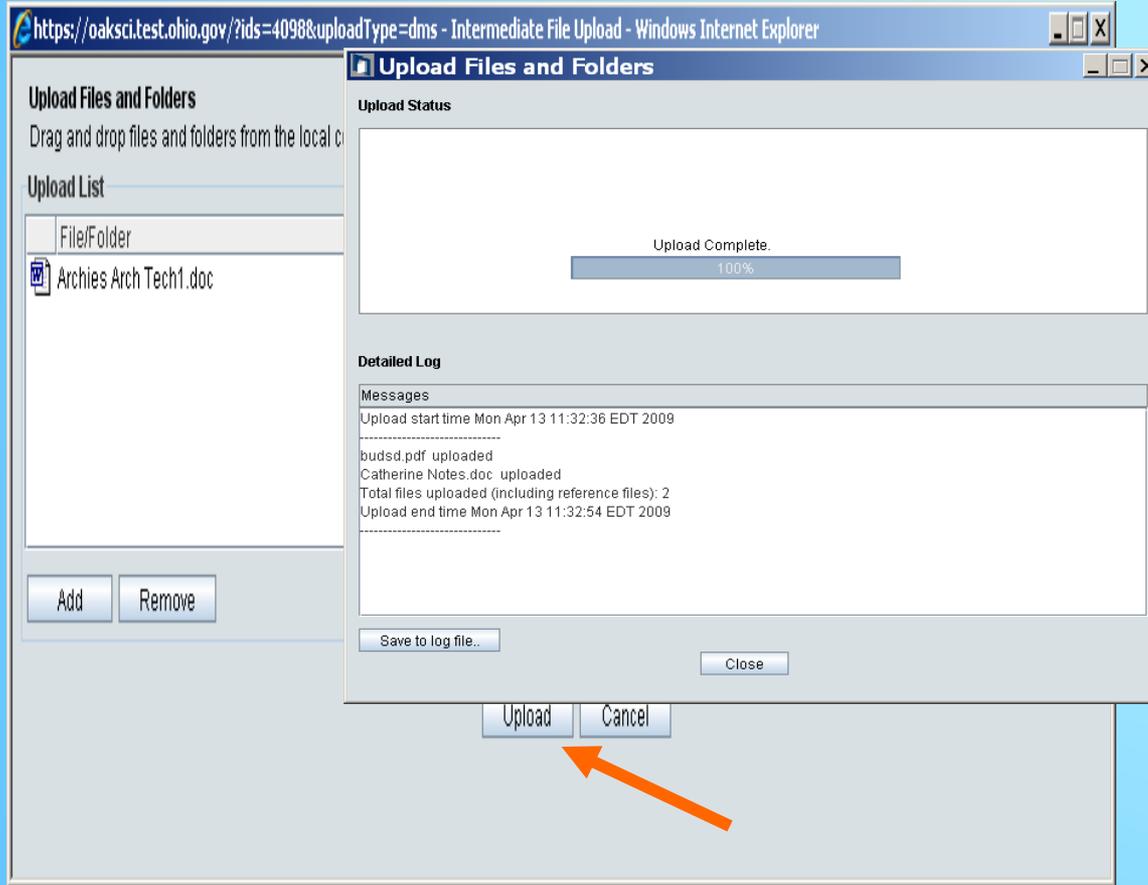
Ref	BP	Name	Size	Upload Date	Owner	Title
		A-1CONFORMED.pdf	397 KB	03/13/2008	Oaks Student 1	
		A1-1.pdf	561 KB	03/13/2008	Oaks Student 1	
		A2-1.pdf	708 KB	03/13/2008	Oaks Student 1	
		A2-2.pdf	1017 KB	03/13/2008	Oaks Student 1	
		A3-1.pdf	443 KB	03/13/2008	Oaks Student 1	
		A4-1.pdf	539 KB	03/13/2008	Oaks Student 1	
		A5-1.pdf	327 KB	03/13/2008	Oaks Student 1	
		A5-2.pdf	448 KB	03/13/2008	Oaks Student 1	
		A7-1.pdf	415 KB	03/13/2008	Oaks Student 1	
		A8-1.pdf	622 KB	03/13/2008	Oaks Student 1	
		A9-1.pdf	377 KB	03/13/2008	Oaks Student 1	

# File Upload



- ▶ Click Add
- ▶ Choose document or folder to upload
- ▶ Click Open

# File Upload



- ▶ Document or folder is populated into Upload list
- ▶ Click Upload
- ▶ Box will pop up indicating the upload is Complete

# Payment Request

- Log into your project (see page 6)
- Click Logs
- Professional Services Pay Request
- Click New

The screenshot shows the Primavera Unifier web interface. The browser address bar displays 'Unifier@https://oaksci.training.ohio.gov - Windows Internet Explorer'. The user is identified as 'ORACLE Primavera Unifier Shauna Hooks (Last login: 07/19/2013 09:55 AM)'. The navigation menu on the left includes 'Projects (Standard)', 'OFCC Specialty Consultant List - Home', 'Summary', 'Alerts', 'uMail', 'Mailbox', 'Collaboration', 'Tasks', 'Messages', 'Drafts', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Logs', 'Fund Allocation', 'Fund Release', 'Fund Transfers', 'Professional Services Agreements', 'Professional Services Amendments', 'Professional Services Pay Request', 'Purchase Orders', 'Vouchers', 'Work Assignments', and 'Reports'. The main content area shows a table titled 'Professional Services Pay Request - Current View: All' with 1 item(s). The table has columns for Title, Agreement Name, and Provider. The first row contains 'Project 1 My Company PR1', 'Consultant Name-Project Number', and 'Amazing Architectural Inc.'. A blue arrow labeled 'a' points to the 'Logs' menu item, and another blue arrow labeled 'b' points to the 'Professional Services Pay Request' menu item. A third blue arrow labeled 'c' points to the 'New' button in the top toolbar.

Title	Agreement Name	Provider
Project 1 My Company PR1	Consultant Name-Project Number	Amazing Architectural Inc.

# Payment Request

Create New Professional Services Pay Request - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

**General** Professional Services Pay Request

General

Organization:	<input type="text"/>	Record Number:	<input type="text"/>
Project Number:	SFC-130888	Creator:	Shauna Hooks
Project Name:	OFCC Specialty Consultant List	Creation Date:	<input type="text"/>
Project Location:	OFCC	Status:	<input type="text"/>
Title:	<input type="text"/> *	Internal Ref. Number:	<input type="text"/>
Contract Reference:	<input type="text"/> Select... *	Professional Services Provider:	<input type="text"/>
Agreement Type:	<input type="text"/>	EDGE Certified Sub?:	<input type="text"/>
Other Description:	<input type="text"/>	Received Date:	<input type="text"/>
Period From:	<input type="text"/> <input type="text"/>	Period To:	<input type="text"/> <input type="text"/>

Professional Services Provider Address

Vendor:	<input type="text"/> Select... *
Address Line 1:	<input type="text"/>
Address Line 2:	<input type="text"/>
City:	<input type="text"/>
State:	-Select-
ZIP:	<input type="text"/>

**Complete all available Fields**

Action Details

Pay Request Details

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# Payment Request

Create New Professional Services Pay Request - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

### Professional Services Pay Request

**General**

Contract Reference:  Select... \* Professional Services Provider:

Agreement Type:  EDGE Certified Sub?:

Other Description:

Received Date:

Period From:  \* Period To:  \*

**Professional Services Provider Address**

Vendor:  Select... \*

Address Line 1:

Address Line 2:

City:

State:

ZIP:

**Payment Requested**

Final Payment?:  \* Amount (\$):  \*

Invoices for Reimbursable Exp. Attached?:  \* Line Item Total (\$):

Difference (\$):

Notes:

**Action Details**

**Pay Request Details**

[Attachments \(0\)](#) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

Complete available fields  
Click the Pay Request  
Details Tab



# Payment Request

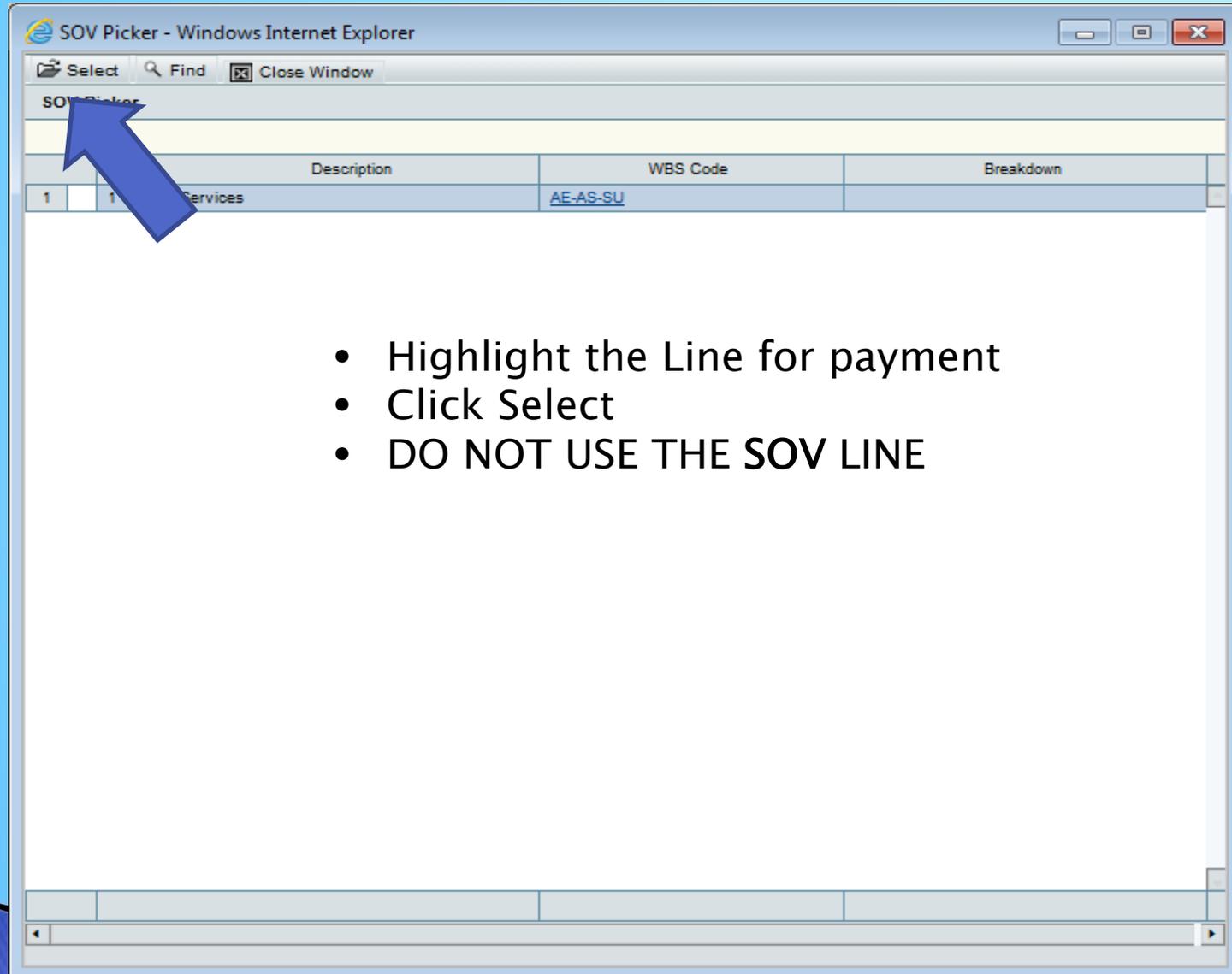
The image shows a web application interface for creating a new professional services pay request. The main window is titled 'Create New Professional Services Pay Request' and has a menu bar with 'File', 'Edit', 'View', 'Actions', and 'Help'. Below the menu bar are buttons for 'Send', 'Save', 'Spelling...', and 'Add At...'. The left sidebar contains tabs for 'General', 'Action Details', and 'Pay Request Details'. The main content area shows 'Current View: All' and '0 Item(s)'. At the bottom, there are buttons for 'Add', 'Copy', 'Import', and 'Re...'. A blue arrow points to the 'Add' button with the text 'Click Add'.

An 'Line Item - Windows Internet Explorer' dialog box is open, titled 'Professional Services Pay Request Line Item:'. It has a menu bar with 'Spelling...', 'Attach', and 'Delete Line Item'. The dialog box contains a 'General' section with the following fields:

- WBS Code: Type a WBS code... (with a dropdown arrow)
- Code Name: [Text Field]
- Short Description: [Text Field]
- Professional Services EDGE Certified?: No (with a dropdown arrow)
- Amount (\$): [Text Field] \*
- Subcontractor/Supplier: [Text Field] Select...
- EDGE Certified Sub?: [Text Field]

Below these fields is a 'Notes:' section with a text area. At the bottom of the dialog box are 'Attachments (0)' and 'Linked Records (0)' sections, and 'OK' and 'Cancel' buttons. A blue arrow points to the 'WBS Code' field with the text 'Click Arrow'.

# Payment Request



The screenshot shows a web browser window titled "SOV Picker - Windows Internet Explorer". The browser's menu bar includes "Select", "Find", and "Close Window". The main content area displays a table with the following structure:

	Description	WBS Code	Breakdown
1	Services	<a href="#">AE-AS-SU</a>	

A blue arrow points to the "Select" button in the browser's menu bar. Below the table, there is a list of instructions:

- Highlight the Line for payment
- Click Select
- DO NOT USE THE SOV LINE

# Payment Request

Line Item - Windows Internet Explorer

Spelling... Attach Delete Line Item

Professional Services Pay Request Line Item:

General

WBS Code: AE-AS-SU \*

Code Name: AE Site Surveying Services

Short Description: \*

Professional Services EDGE Certified?: No

Amount (\$): \*

Subcontractor/Supplier: Select...

EDGE Certified Sub?:

Notes:

Attachments (0) Linked Records (0)

OK Cancel

- Type in a Short Description
- Type in the dollar amount requested
- Click Ok

# Payment Request

Professional Services Pay Request

Organization:  Record Number:

Project Number: SFC-130888 Creator: [Tim Price](#)

Project Name: OFCC Specialty Consultants Creation Date:

Project Location:  Status:

Click Arrow down next to Add Attachment to attach any supporting documentation, this will take you back to document manager

Payment Requested

Action Details

Pay Request Details

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# Payment Request

Create New Professional Services Pay Request - Project No, SFC-130888 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions Submit

Send Save Spelling.. Add Attachment Discussion SOV Close Window

**Professional Services Pay Request**

**General**

General

Organization:  Record Number:

Project Number: SFC-130888 Creator: [Tim Price](#)

Project Name: OFCC Specialty Consultants Creation Date:

Project Location:  Status:

Title: sample pr3 \* Internal Ref. Number:

Contract  & Associates, Inc.

Agree

Other D

P  14 05:00 PM Local (GMT-  \*)

**Choose Workflow Action- Submit**

Professional Services Provider Address

Vendor: Frank Locker Inc.  Select... \*

Address Line 1: 306c Dover Point Rd,

Address Line 2:

City: Dover

State: New Hampshire

ZIP: 03820

Payment Requested

Action Details

Pay Request Details

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# Payment Request

Professional Services Pay Request - PR1 - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions Submit

Send Save Spelling... Add Attachment Discussion SOV Close Window

### Professional Services Pay Request

**General**

Organization:   
Project Number: SFC-130  
Project Name: OFCC S  
Project Location:   
Title: PR1 \* Internal Ref. Number:

**Action Details**

**Submit**

To...   
Cc...   
Send For: **Approval and Validation**

Task Notes:

**Pay Request Details**

Current View: All

1 Item(s) Page 1 of 1 Display 100 items per page

No.	WBS Code	Code Name	Short Description	Amount
001	CS-FA-EN	CS Environmental Survey	Sur	5,000.00

Total Amount: \$ 5,000.00

Add Copy Import Remove Grid Find

Attachments (1) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

- In the Action Details Tab, Click To and choose the appropriate PM

# Payment Request

Professional Services Pay Request - PR1 - Project No. SFC-130888 - Windows Internet Explorer

File Edit View Actions Help Workflow Actions Submit

Send Save Spelling.. Add Attachment Discussion SOV Close Window

### General

Professional Services Pay Request

• **Click Send**

Record Number:

Project Number: SFC-130888 Creator: [Tim Price](#)

Project Name: OFCC Specialty Consultants Creation Date:

Project Location:  Status:

Title: PR1 Internal Ref. Number:

### Action Details

**Submit**

To...

Cc...

Send For: **Approval and Validation**

Task Notes:

### Pay Request Details

Current View: All

1 Item(s) Page 1 of 1 Display 100 items per page

No.	WBS Code	Code Name	Short Description	Amount
001	CS-FA-EN	CS Environmental Survey	Sur	5,000.00

**Total Amount: \$**

[Attachments \(1\)](#) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# Questions?



Call OAKS CI @  
614.644.2211 OR Email  
[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)